



# HILLIARD LYONS

## Mahurin Wealth Advisory Team



## Summer of 2017 Quarterly Newsletter

### Peter Mahurin

HL Financial Services, LLC  
Board Member  
Senior Vice President  
Financial Consultant

### Shannon Vitale

Financial Consultant

### Robert Kirby

Financial Consultant  
Trust Officer Emeritus

### Mac Jefferson, CFA, AAMS®, CWA®

Financial Consultant

### Matthew Garrett, CFP®

Financial Consultant

### Gwen Reynolds

Registered Client Service  
Associate

### Sandra Riehn

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### Kim Herald

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### Kelsey Cooksey

Client Service Associate

## Hilliard Lyons

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Welcome to our first quarterly newsletter. We believe this avenue of communication is a great opportunity to keep everyone up to speed with Hilliard Lyons and our team. It has been a very busy spring for our group, due to the transition onto our new technology platform and the completion of tax season. The Mahurin Wealth Advisory Team would like to thank you, our clients, for putting your trust in our team to grow, protect, and distribute your wealth. We pride ourselves on delivering excellent client service, professional investment advice, and customized financial planning solutions. As we move into the second half of 2017, we hope that you have a happy and safe summer.

## Are you headed in the right direction?

What **choices** are you making to ensure you and your family are prepared to meet future financial needs?

Our comprehensive financial planning analysis is specifically designed to assist you in charting a course of action to attain your financial goals in such critical areas as:

- Retirement income strategies
- Risk management, including life, health, and disability insurance needs
- Estate preservation
- College education funding
- Charitable giving
- Successful investment management
- Debt management



[Click here](#) to request an appointment with our team, and learn more about our comprehensive financial planning analysis.



## Employee Spotlight Kelsey Cooksey Client Service Associate

### *Where are you from?*

I was born in Bowling Green, but I grew up in Cincinnati.

### *What brought you back to this area?*

My grandparents ran Boyce Store in Alvaton. When I graduated high school I moved down here in June, spent the summer working at the store, and attended WKU in the fall.

### *Tell us about your family:*

I met my husband while working at Boyce Store. He also attended WKU. He is employed at Hobdy Dye and Read. He raises cattle and we have a miniature Dachshund named Scarlett.

### *What are your favorite things to do outside of Hilliard Lyons?*

I enjoy spending time with my family, being outdoors, riding four wheelers, gardening, and helping out on the farm. I also love to make jewelry. In our free time we like to shop for antiques.

### *What do you enjoy most about working at Hilliard Lyons?*

I enjoy learning about the financial industry and the relationships that are built with our clients.

### *Is there anything else we should know about you?*

I am currently attending South Central Community and Technical College. I am working towards my Associates Degree in Administrative Systems Technology, and after completion I will pursue a degree in Organizational Leadership at WKU.



## Pete Mahurin Honored

Pete Mahurin, Senior Vice President and Financial Consultant, was recently named to the *Financial Times* "400 Top Financial Advisers" for 2017. Pete has worked for Hilliard Lyons since 1968. He also serves on the board of Hilliard Lyons Financial Services LLC, the parent company of Hilliard Lyons, Houchens Industries, Gray Construction, and on the boards of three Kentucky community banks. He has distinguished himself as one of Hilliard Lyons' #1 Financial Consultants several times. We congratulate Pete on this significant recognition.

## Pete and Dixie Mahurin Honors College

In April, Pete and Dixie Mahurin had the distinct honor of having the Honors College on Western Kentucky University's campus renamed the Peter and Dixie Mahurin Honors College. The Mahurin's have been lifelong supporters of WKU. Most notably in 2011 they were honored as WKU Philanthropists of the Year. They were also instrumental in bringing the World Council for Gifted and Talented Children headquarters to WKU. The Mahurin's created the Mahurin Endowed Professorship in Gifted Studies. Pete is a founding member of the WKU Foundation and Dixie is a founding member of the WKU sisterhood.





## Community Involvement Spotlight of the Quarter The Women’s Fund of South Central Kentucky

The women in our office have been involved with The Women’s Fund of South Central Kentucky since its inception. The organization consists of talented women who volunteer their time and resources to provide lasting benefits throughout our community. The purpose of The Women’s Fund is to make “a positive impact on the lives of women and children of South Central Kentucky, now and forever” by collectively funding significant grants to charitable initiatives. To date, \$342,140 has been granted to the community by The Women’s Fund. In October, The Salvation Army won the coveted 2016 Impact Grant for its “Pathway of Hope” program. This program is designed to help families start their path from homelessness to hopefulness.

Please mark your calendar with these important dates for 2017:

- June 30<sup>th</sup> Membership Deadline
- July 13<sup>th</sup> Grant Total Announcement
- September 19<sup>th</sup> Announcement of Grant Finalists
- October 23<sup>rd</sup> Annual Meeting & Grant Awards.



The Women’s Fund is both a permanent endowment fund and a nonpermanent fund established to benefit women and children. The fund is managed and invested within the Community Foundation of South Central Kentucky. The permanent fund is building a legacy that will impact the lives of women and children in our area forever! Learn more: [www.cfsky.org/womens-fund](http://www.cfsky.org/womens-fund)

### Document Shred Event



In April we held our 2<sup>nd</sup> annual Document Shredding Event. As expected, it was very well received. Shown in the picture is one of our WKU student interns, Parker McClearn. Parker is helping unload boxes of documents that were brought in to be shredded.

### CONGRATULATIONS 2017 GRADUATES!

We wish you the best of luck in your future endeavors!



Shannon Vitale’s son, Jack, graduated from Bowling Green High School in May. He will be attending the University of Kentucky in the fall. Congratulations Jack!

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